



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**January 21, 2020**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals  
FY 2019 annual targets  
FY 2019 actuals  
FY 2019 actuals as a percentage of annual targets  
FY 2019 actuals as a percentage of FY 2018 actuals  
FY 2020 actuals to date  
FY 2020 annual targets  
FY 2020 actuals as a percentage of FY 2020 annual targets

**The general target is 50% for FY 2020 to date, July 1, 2019-December 31, 2019**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- DPHHS continues to work through data entry and reporting problems with the new state database system. Until the problems are fully resolved, data on the following performance measures/workload indicators may be incomplete:
  - Amount of Client Savings from Benefits Counseling
  - Number of Outreach, Information, Referral Contacts
  - Benefits Counseling Savings and Hours of Service
- **Nutrition**
  - We have increased outreach for the MOW program as we have the capacity to serve additional participants and are now outpacing the target for the year as well as last year’s actuals.
- **Transportation**
  - After school program ridership continues to be down from this time last year due to the elimination of the Kalispell City Parks and Rec rides. However, increased ridership on the Kalispell Green, Red and Orange city bus lines continues to hold steady, putting us just under the pace of total ridership from FY 2019.
  - Ridership on the fixed and commuter routes continue to substantially exceed the target. Paratransit ridership continues to be under target due in part to the changes in fixed route service in Kalispell that make it easier for DAR passengers to ride the fixed route.

- Trip denials for paratransit, which had surged in November, have decreased and appear to have leveled off. We're monitoring the situation closely and anticipate further decrease when we implement our new Assisted Transportation service in the next month or two.
- **Information and Referral/Assistance**
  - **Outreach/Education** efforts continue to successfully target Medicare beneficiaries to connect them with additional benefits.
- **Independent Living Services**
  - The total "units of service" for all services combined continue to be substantially below target due to industry-wide paid caregiver shortages. We continue to work internally and with our home care provider agencies to develop other strategies, including using Assisted Transportation funds to pay for door-to-door Eagle Transit service for older adults to travel around and between Kalispell and the communities of Whitefish, Columbia Falls, Bigfork and possibly Lakeside. We're in the process of finalizing our proposal to DPHHS and expect to get approval shortly.
- **Benefits Counseling**
  - As expected, the cost savings for clients and hours of service are almost at target due to Medicare Open Enrollment. However, cost savings for December are not yet available as we continue to work through data reporting issues.
- **Ombudsman**
  - The program continues to undergo review and potential restructuring at the state level.

## **AOA Administration**

### ***Budget and Contracts***

- We are working with Finance on the FY 2021 budget and FY 2020 amendments.

### ***Building***

- Nothing to report.

### ***HR/Staff Development***

- We are working with HR to restructure some existing positions and request new positions related to Older Americans Act/VA programs and transit increases.

## **State/Federal/Legislative Issues**

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa will not be able to attend the quarterly meeting in Helena in January.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expired at the end of September.
  - The House unanimously approved a bipartisan bill to reauthorize the Act for 5 years, called the Dignity in Aging Act, on October 28, 2019. The bill would also provide annual increases in funding, clarify authorization for AAAs to provide services beyond the Act and recognize and prioritize the need for services that prevent/address social isolation and loneliness among older adults. It is waiting to be taken up by the Senate.

- National Association of Counties – The January 14<sup>th</sup> edition of the CN Now newsletter highlighted the efforts of counties around the country to provide supportive services to older adults, create inclusive communities and advocate for the reauthorization of the Older Americans Act.

### **AOA Advisory Council**

- The Council met on January 9<sup>th</sup>. The agenda included a presentation on AOA's Veteran Directed Care Program, update on Eagle Transit services and annual Transportation Coordination Plan and continued discussion about member recruitment/development as we have 12 vacancies on the Council out of 17 total positions total.
- The next meeting will be March 12, 2020.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

12/2/2019: KGEZ monthly interview, 15,000

12/3/2019: Medicare/BEC Outreach at Bigfork Imagine If Library, 10

12/17/2019: Medicare 101 Class, 7

12/20/2019: Daily Inter Lake "Newsbrief": promotion of Christmas meal, 17,500

12/25/2019: Daily Inter Lake article, "Demand for Bigfork Meals on Wheels up considerably," 17,500

December ads for Medicare/BEC in Daily Inter Lake, Hungry Horse News, Bigfork Eagle, Whitefish Pilot (4), 29,950

December multimedia promotion of Medicare 101 class: 3000-17,500 per run

December BEC commercials on KGEZ: 48 ads per month, 15,000 per run

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - Annual Transportation Coordination Plan/5311 Application/Capital Request – due 3/3/2020
    - Staff completed the annual summary and outreach to private transit providers in the area. An ongoing business owner survey is in progress.
    - Transportation Advisory Committee (TAC) met on January 2, 2020 to provide annual input on Transportation Coordination Plan (TCP).
      - TAC priorities include continued pursuit of the Mountain Climber concept with a focus on increased commuter service between Flathead Valley communities and the addition of expanded hours/weekend service to focus on worker mobility and economic development.
    - Draft of TCP, 5311 application, FY 2021 budget and capital request/justification is almost complete and will be submitted to the TAC next week in preparation for their final review and vote on February 6, 2020.
    - **Request:** to present the TCP/5311 application/Capital request for Commissioner vote on 12/18/20 in lieu of regular monthly report (as done in the last few years).
  - Quarterly/annual reporting
    - We completed and submitted revised entries for FY 2019 into the National Transit Database (NTD) to MDT in December. No additional revisions have been requested.
  - 5-Year Transportation Development Planning Grant
    - We received the final consultant report on potential changes to Evergreen and Columbia Falls service at the end of December and are in the process of reviewing it.
    - During ongoing discussions with Glacier National Park in December regarding the Cooperative Agreement and the potential for other future partnership, we continued to

meet with community leaders and other stakeholders to gauge interest in and support for an integrated transit system. Since the last report:

- On 12/4/2019, Tom presented to the Kalispell Business Improvement District, 10 attendees
- On 12/18/2019, Tom, Lisa and Nicole presented to the Whitefish Climate Action Committee, 6 attendees
- The grant expired at the end of December. We will incorporate related information/efforts into the annual TCP and plan to complete and submit a final TDP report to MDT in March.
- Outreach/Education/Media/Special Events:
  - To satisfy federal regulations, daily radio ads run on KGEZ.
  - See above for outreach related to the integrated transit system proposal since last month's report.
- Operations:
  - Eagle Transit passengers can now access a new free app for smart phones called "moovit."
  - We're still working on getting our routes completed on Google Transit, but they want your routes to be static with few updates. Because we've been making frequent changes over the last year or so related to our TDP we've held off completing the process and going live.
- Staff Development/Training:
  - We're working with HR to restructure some positions.
- Transportation Advisory Committee (TAC)
  - The TAC will meet next on February 6, 2020 to vote on the annual TCP/5311 application and Capital Request.
- Glacier National Park
  - The Cooperative Agreement expired on December 31, 2019. We are in the process of completing our final invoice to them and should submit that by the end of this month.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- Our annual Christmas Meal was held on Friday December 20<sup>th</sup>. We served 460 people.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- I&A/Benefits Counseling/BEC:
  - Medicare Open Enrollment ended December 7<sup>th</sup>.
  - We were awarded a new BEC grant that begins January 1, 2020.
- Veteran Directed HCBS Program:
  - We have a total of 39 vets enrolled. We took the program over from Area VI on October 1<sup>st</sup> with 25 vets enrolled. Given the increase in the client census, we are preparing for the addition of another .5 Veteran Care Coordinator.
- Independent Living Services:
  - Although we have begun to add clients to services, given the paid caregiver shortage, we continue to explore other options meet client needs.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lisa met with the Whitefish Community Center Board on 12/19/19.
- We're still waiting to hear about the CDBG Planning Grant application for the Bigfork Center.

# January 2020 Report: Performance Measures Tables - December 2019 stats (FY 2020)

50.00%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	December	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	4	57	61	119	51%
# Receiving Meals on Wheels	374	465	401	86%	107%	25	331	356	465	77%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	109	1,072	1,181	1,200	98%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	11	216	227	450	50%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	Not Yet Available	\$336,449	\$336,449	\$400,000	84%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%		92%	0%	88%	0%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	\$5.82	\$6.03	\$5.82	\$7.00	83%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	0	12	12	25	48%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	December	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
<b>Nutrition</b>						December				
Total Meals	80,639	80,000	78,515	98%	97%	7,847	36,105	43,952	80,000	55%
MOW	47,409		46,658	N/A	N/A	5,024	21,939	26,963		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	2,823	14,166	16,989		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%		824	824	2,000	41%
<b>Transportation</b>						December				
Total Ride Count	99,104	90,000	116,017	129%	117%	7,535	49,209	56,744	100,000	57%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	1,700	9,525	11,225	30,000	37%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	5,835	39,684	45,519	70,000	65%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	4	28	32	25	128%
<b>Information and Referral/Assistance</b>						December				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	1,650	9,275	10,925	18,000	61%
Outreach/Education/Media Efforts	116	120	129	108%	111%	12	52	64	120	53%
<b>Independent Living</b>			66%			December				25%
Homemaker Units of Service	2,005	1,324	1,433	108%	71%	146	697	843	2,000	42%
Escorted Transportation Units of Service	2,314	1,391	886	64%	38%	62	359	421	2,174	19%
Respite Units of Service	2,079	3,250	1,793	55%	86%	119	451	570	2,857	20%
Community Support/Senior Companion Units of Service	1,310	1,176	508	43%	39%	44	206	250	1,471	17%
Personal Care Units of Service	231	65	146	225%	63%	13	53	66	174	38%
<b>Benefits Counseling</b>						December				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	126	338	464	500	93%
<b>Ombudsman</b>						December				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	80	384	464	1,000	46%